

**Special Edition:
AFRICA**



On the occasion of the 4th Africa Aviation Summit 2019
Kigali Rwanda

The Re-Positioning of Africa in Aviation: Towards a Shift in the Hubbing Dynamics

Africa Demography: Growth and Progress.....	2
The Shift in the Hubbing Dynamics and a Global Repositioning for Africa	4
Qatar & Africa – Partners in Development	6
Qatar Airways Cargo expands freighter network in Africa	8
Qatar Airways' Role in Protecting Endangered Species	9
Key messages	10
No Borders, Only Horizons	11



AFRICA DEMOGRAPHY: GROWTH AND PROGRESS



AFRICAN DEMOGRAPHY GROWTH AND PROGRESS



By committing to break down these various barriers, we will send a tremendous signal in Africa and beyond that it is no longer business as usual.”

H.E. President Paul Kagame

Republic of Rwanda

Population growth

Current estimates suggest there are about 1.3 billion people on the continent as per data compiled by the United Nations Population Fund (UNFPA).

Population projections

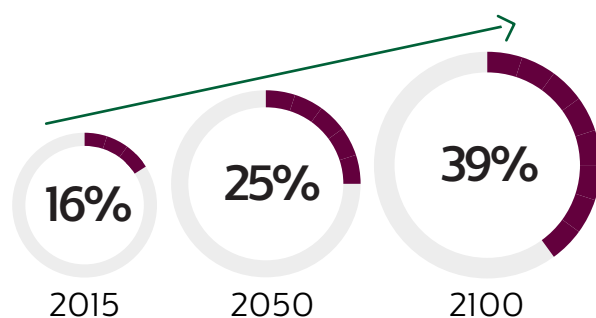
2025 ⇒ 1.397 - 1.486 billion

2050 ⇒ 2.5 billion

2100 ⇒ 4.185 billion



Africa's share of global aviation should match Africa share of global population



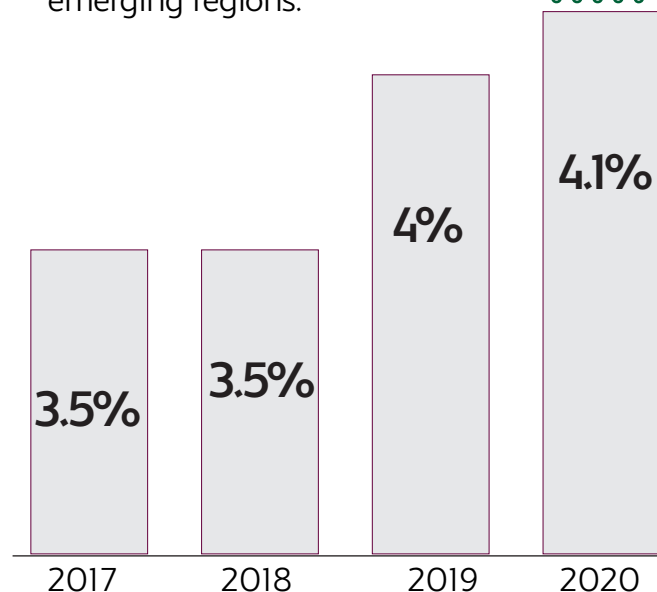
Source: United Nations Population Fund (UNFPA)

Economic growth

The 2019 African Economic Outlook from the African Development Bank shows that the continent's general economic performance continues to improve.

Gross Domestic Product projections

Africa's growth is projected to be higher than that of other emerging regions.



Source: The 2019 African Economic Outlook from the African Development Bank



SAATM and the African Union Agenda 2063

African Union Agenda 2063 is the strategic framework for the socio-economic transformation of the continent over the next 50 years. It builds on, and seeks to accelerate the implementation of past and existing continental initiatives for growth and sustainable development.



“

With the pan-African vision embraced by the Single African Air Transport Market (SAATM), the day will come when Africa starts negotiating Comprehensive Air Transport Agreements with other countries and economic blocs.”

H.E. Akbar Al Baker
Group Chief Executive, Qatar Airways

28 countries
signed SAATM

14 out of the 28 have
already signed a
Memorandum of
Implementation

The Single African Air Transport Market (SAATM)

SAATM is a flagship project of the African Union Agenda 2063, an initiative of the African Union to create a single unified air transport market in Africa.

Stakeholders in the implementation of SAATM



African Civil Aviation Commission (AFCAC) is the Executing Agency Of The Yamoussoukro Decision (YD)



The African Airline Association (AFRAA) has been developing air transport policies in Africa.



The African Development Bank (AfDB) Groups' objective is to spur sustainable economic development and social progress in its regional member countries.



The Guiding Vision for Agenda 2063 is the African Union Vision

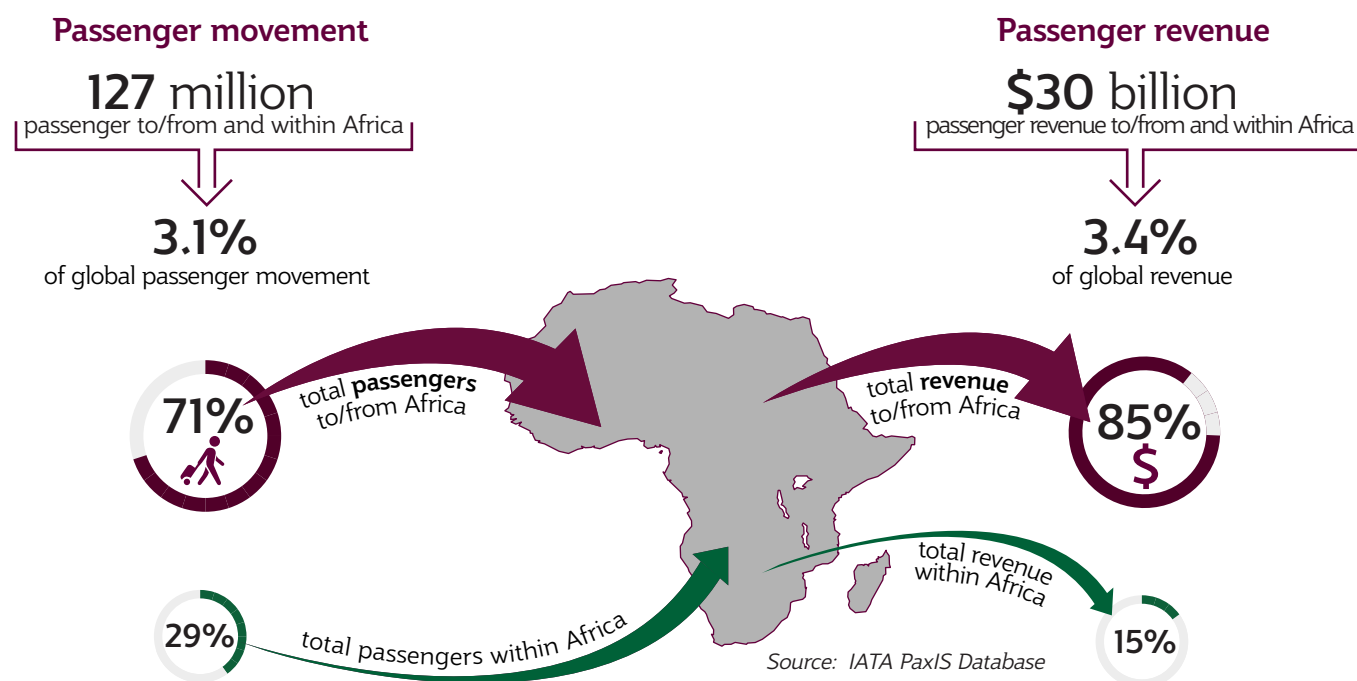
The SAATM will eliminate the need for separate bilateral air service agreements (BASAs) between individual countries.



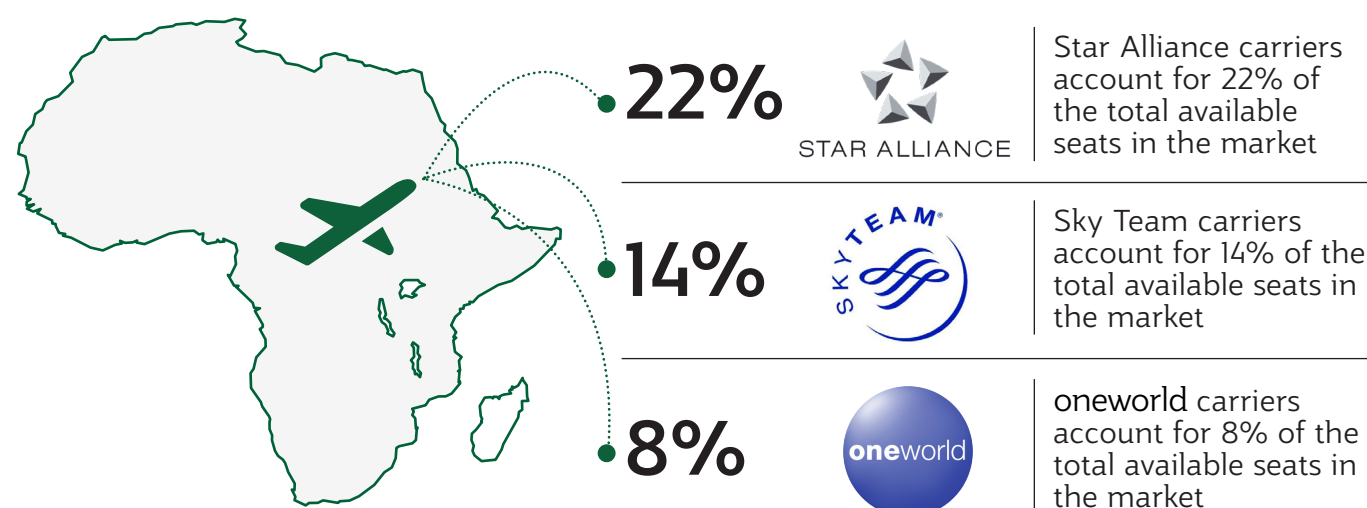
THE SHIFT IN THE HUBBING DYNAMICS AND A GLOBAL REPOSITIONING FOR AFRICA



In 2018, approximately 127 million passengers were carried to, from and within Africa, generating almost 30 billion US dollars in revenue.



African airlines have been critical of foreign airlines “stealing their lunch”



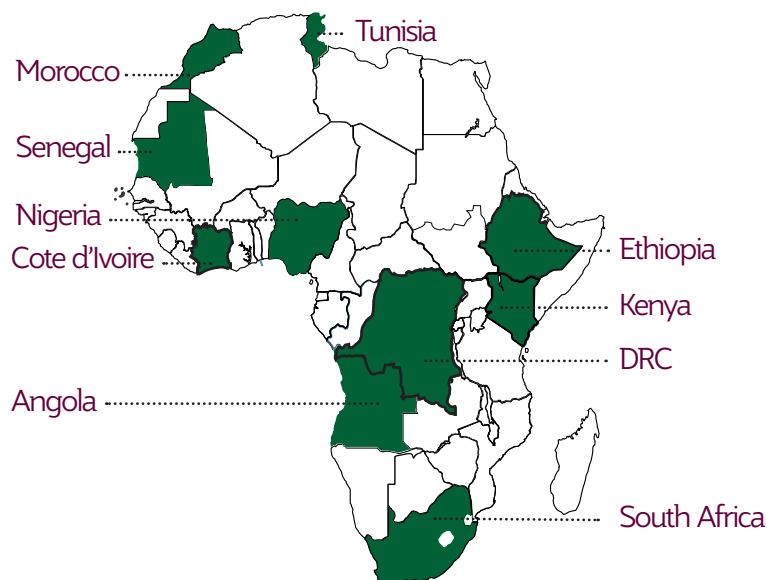
From an African airline perspective, **10 airlines operating to and from a total of 7 hubs in the continent have captured over 80% of the market**, both in terms of passenger movement and revenues.



Moving to the topic of airports...

Similar levels of concentration of capacity appear. Of the approximately 320 international airports in Africa, 10 airports in 7 countries account for 49% of total seat capacity and 50% of the total revenues of the entire aviation market to and from Africa.

Top 10 airports in Africa



 **320** International airports in Africa

Concentration of traffic (international)

Airports	Seat Capacity	Revenue
Top 10	49%	50%
Others	51%	50%
100%		

Concentration of traffic (Domestic)

Airports	Seat Capacity	Revenue
Top 10	56%	55%
Others	44%	45%
100%		

Shifting hubbing dynamics

Global connectivity brings opportunities and prosperity. A shift towards a new hubbing dynamic will put many African capitals on the global map of aviation.

The proposed shift will complement the implementation of the Single African Air Transport Market (SAATM) initiative and ensure Africa's global leadership in aviation for years to come.

Recipe for growth

- Medium size airlines in under-served markets
- Super-connecting hubs
- Latest airport technology
- Best passenger experience
- High levels of efficiency

Collaboration with African Airlines



The AU Passport

The AU Passport is a common passport document that is set to replace existing nationally-issued African Union member state passports



QATAR & AFRICA – PARTNERS IN DEVELOPMENT



Qatar Airways' commitment to the African continent is undeniable.

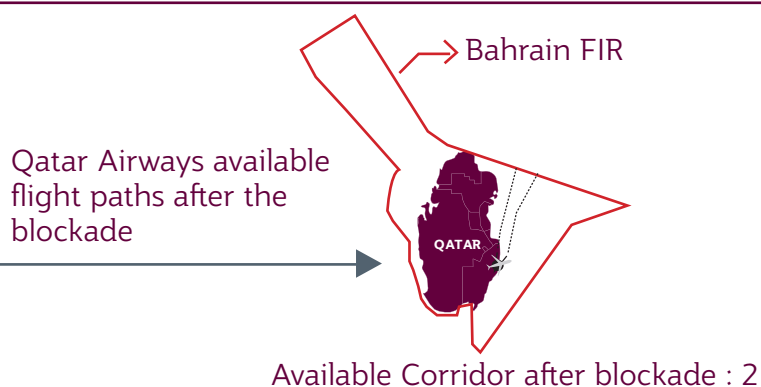
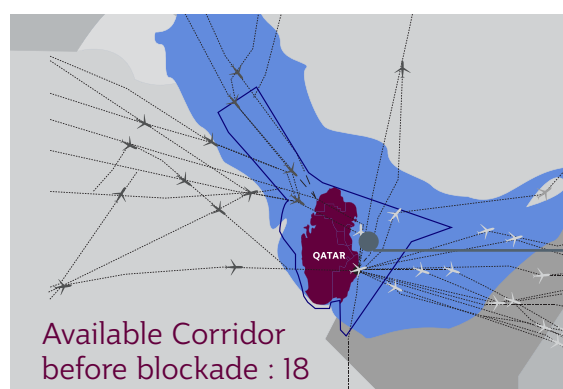


We currently operate passenger services to 21 destinations in 15 countries. We also operate all-cargo services to 7 countries across the continent, carrying African agricultural products and other African imports to Qatar and beyond.

Qatar Airways' operations to the African continent

- **21** Destinations (passenger) in 15 countries.
- **7** countries in Africa operate all-cargo services

The Blockade...

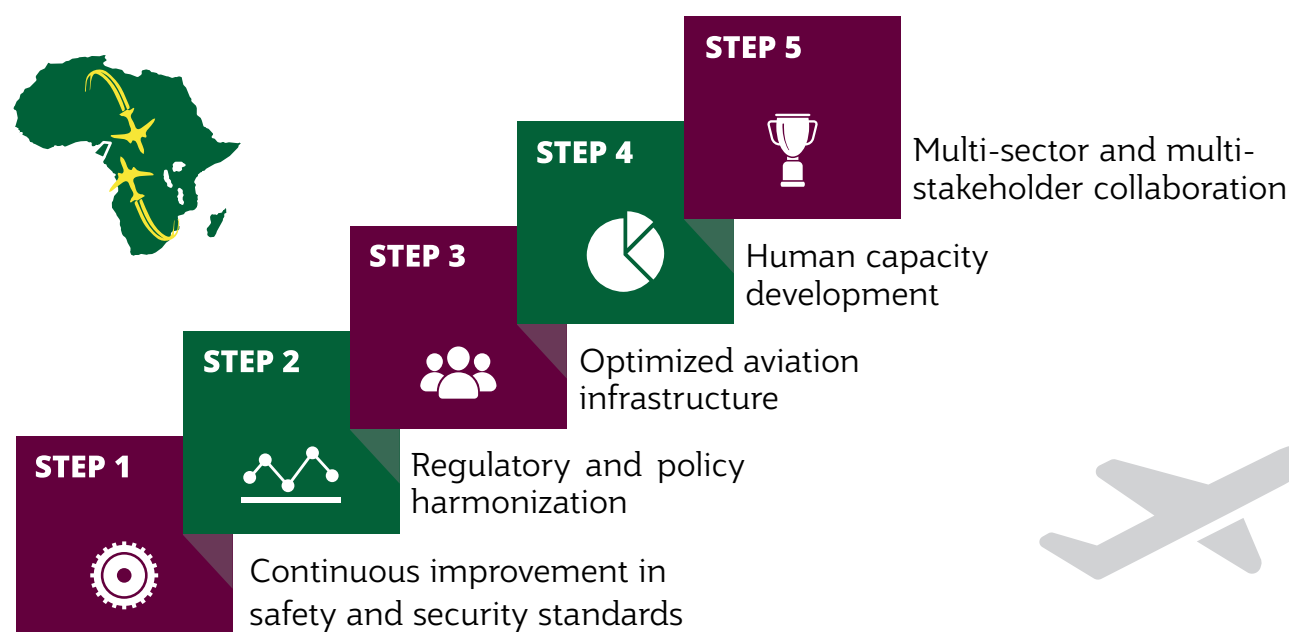


Due to the unjust blockade, Qatar Airways was forced to suspend planned new destinations in West and Central Africa. However we continue to explore alternative routes and potential partnerships that may make these routes economically viable.

The blockade on Qatar actually resulted in a blockade on many current and planned routes and flights to Africa



Our proposal supports the pillars of the Single African Air Transport Market



Strengthening areas of collaboration

- **Flight Information Region** – Building a safer and more efficient route network in partnership with civilian and military authorities is critical for overflying traffic and airline hub development.
- **Training/Capacity Building** – The creation of education and training programs to ensure effective management and leadership within the airline industry.
- **Infrastructure Development** – Investment in the transportation systems, including airports and associated surface transportation, will support continued growth.
- **Tourism Development** – Aviation plays a central role in supporting the tourism sector, and is a key driver of economic development. Kigali, which is number one in conference tourism in Africa, is a good example.



There are mutual benefits to investment and collaboration with local aviation partners

The aim is to enhance freedom of movement, to serve the market and to spur development. We believe in Africa's aviation potential and stand ready to offer a long-term partnership. For Qatar Airways, collaboration and sustainable investments in:

- Local infrastructure
- Human capital
- Capacity building

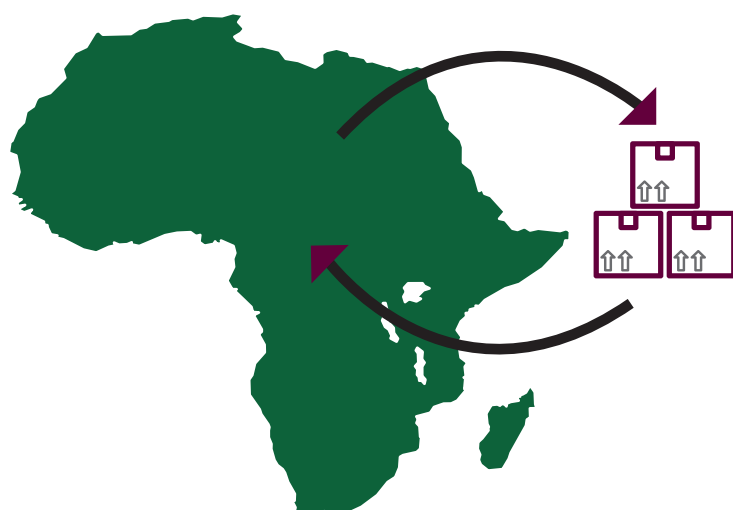


QATAR AIRWAYS CARGO EXPANDS FREIGHTER NETWORK IN AFRICA



Qatar Airways Cargo the world's second largest cargo carrier has a wealth of experience in the air freight business and offers cargo capacity on a young and modern fleet of 23 freighters including belly-hold services to a global network using more than 180 passenger aircraft. Qatar Airways Cargo also offers distinctive products, namely QR Pharma, QR Live, QR Charter and QR Express offering efficiency and compliance in the handling of temperature-sensitive pharmaceutical cargo, transportation of live animals as well as time-critical shipments.

The total African continent cargo import/export



861,392 tonnes
Export from Africa in 2018

959,310 tonnes
Import from Africa in 2018

Source: Jan-Dec18 WACD

Qatar Airways African Cargo Operations



7
weekly freighters to Africa

Exports from Africa

61,257 tonnes

Imports to Africa

68,598 tonnes



QATAR AIRWAYS' ROLE IN PROTECTING ENDANGERED SPECIES



The illegal trade in wild animals and animal products is one of the biggest threats to the survival of some of the world's most endangered species. Qatar Airways contributes to sustainable development in Africa by preventing illegal wildlife trade.

Qatar Airways has a zero tolerance policy towards the illegal trade of endangered wildlife and is actively engaged in stopping illegal wildlife transportation.

Our objective for wildlife is to:

- Manage wildlife sensitively and invest in conservation projects



United for Wildlife's Transport Industry Declaration brings together wildlife charities, government agencies and private companies to fight the illegal trade and trafficking of wildlife.

Qatar Airways signed the Declaration in March 2016



USAID's Reducing Opportunities for Unlawful Transport of Endangered Species (ROUTES)

Partnership is a select group of private sector, non-government organisations and government agencies collaborating to combat wildlife crime across transportation networks.

Qatar Airways joined the ROUTES Partnership in October 2017.

CROAMIS reporting

Qatar Airways Cargo's upgraded booking system requires additional information for endangered animal shipments listed under the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) listings. This has improved detection rates and resulted in the rejection of numerous animal shipments.

Wildlife occurrences are reported internally using Qatar Airways' occurrence reporting system.



KEY MESSAGES



“Aviation is a considerable force, supporting \$55.8 billion of economic activity and 6.2 million jobs in Africa. But we are only scratching the surface of what aviation can contribute to building Africa’s future.

Alexandre de Juniac, Director General and CEO, International Air Transport Association (IATA)

The benefits of the SAATM will be realised through its effective implementation by the States that have committed and by the remaining States to sign up.

Abderahmane Berthe
AFRAA Secretary General

It is 45 percent more expensive to fly across Africa than any other region in the world. That is why we are trying to let African governments know that is not an elitist means of transportation

Adefunke Adeyemi
Regional Head, Member and External Relations, Africa and Middle East - IATA

The SAATM has the potential for remarkable transformation that will build prosperity while connecting the African continent. Every open air service arrangement has boosted traffic, lifted economies and created jobs. And we expect no less in Africa on the back of the SAATM agreement. An IATA survey suggest that if just 12 key African countries opened their markets and increased connectivity an extra 155,000 jobs and US\$1.3 billion in annual GDP would be created in those countries,

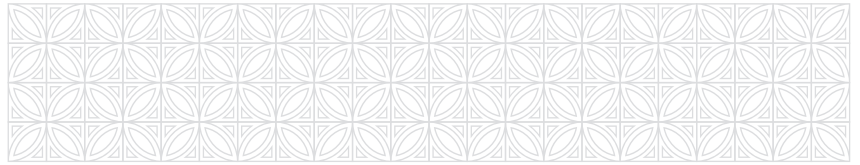
Raphael Kuuchi
IATA’s Vice President for Africa

“Liberalisation can lead to new routes and frequencies, shorter travel times and lower fares. This in turn leads to a growth in air travel, bringing about increased tourism and trade, and therefore economic growth and job creation.”

Ali Tounsi, Secretary General of Airports Council International Africa (ACI)



NO BORDERS, ONLY HORIZONS



On 5 June 2017, Qatar Airways ceased being just a commercial airline and overnight became the only humanitarian bridge connecting the State of Qatar to the world.

Qatar's only land bridge and lifeline was shut down without warning leaving **approximately 3.2 million residents** without access to new shipments of food, medicines, and other critical supplies. Qatar Airways quickly mobilized to provide the humanitarian care required of its international residents while continuing to deliver our five-star customer service, for which we are renowned.

“

As an airline, we do not believe in boundaries. We believe in bringing people together. The world is better that way.

We believe it is a right of all of us to go where we need to go, to feel the things we want to feel, to see the people we want to see.

That is why we will continue to fly the skies, providing our passengers with everything we can and treating everyone how they deserve to be treated.

We do this because we know that travel goes beyond borders and prejudice...

That travel teaches compassion.

That travel is a necessity.

That travel is a right for all.

There should be no borders in the sky, only horizons.

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